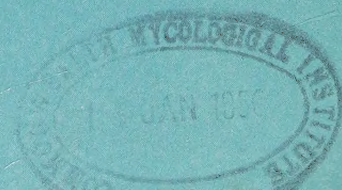
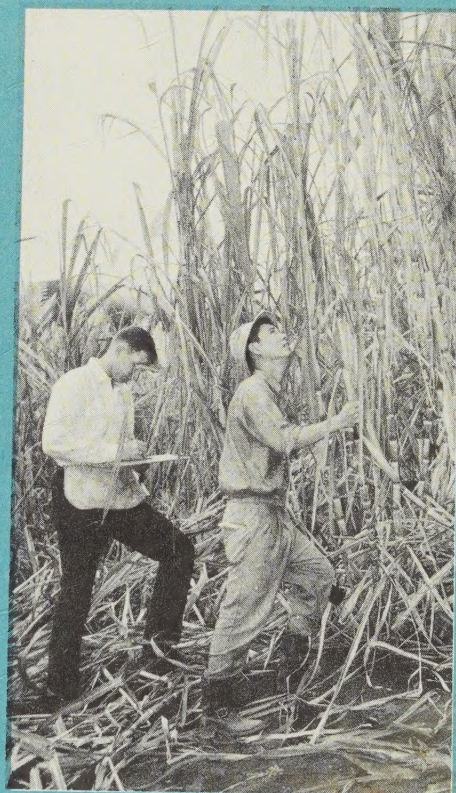


R E P O R T

OF THE PRESIDENT

HAWAIIAN SUGAR PLANTERS' ASSOCIATION

1955



THE HAWAIIAN SUGAR INDUSTRY

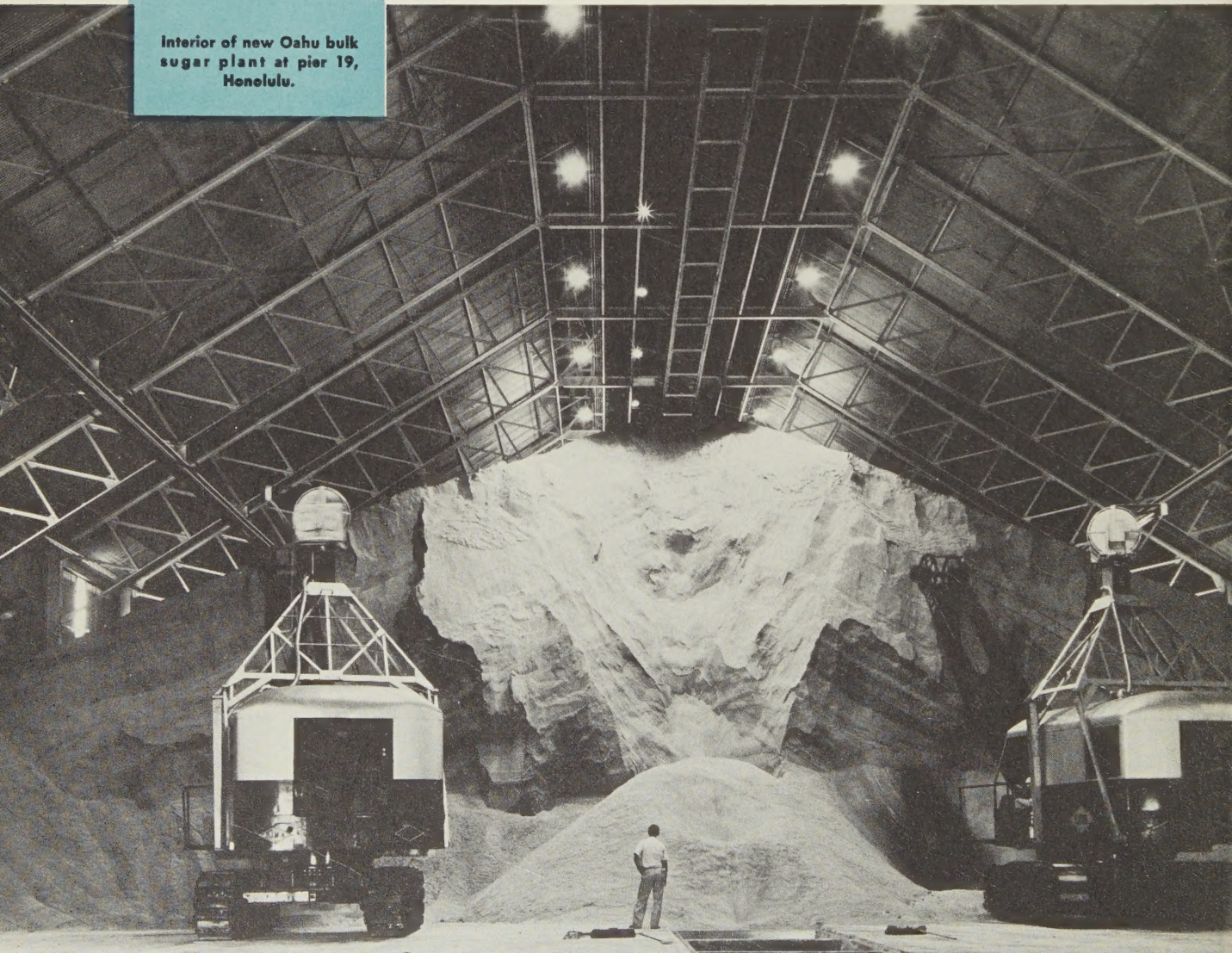
The Hawaiian sugar industry comprises 28 sugar plantation companies; and nearly 2,000 cane growers, either independent or adherent, who supply about eight per cent of the cane produced in the Territory.

The plantation companies jointly own the California and Hawaiian Sugar Refining Corporation, which is the refining and marketing unit for all Hawaiian sugar and molasses. C & H operates a large refinery at Crockett, California, and a small plant at Aiea, Oahu. Hawaiian sugar is sold under the C & H trade name in 25 states of the union.

The Hawaiian Sugar Planters' Association, the non-profit organization of the Hawaiian sugar plantations, is completing its 60th year of service in 1955. One of the major objectives of the association is to perform agricultural and by-product research for the industry. Some \$1,750,000 is expended annually on a wholly industry-financed research station.

Sugar is the largest commercial industry in Hawaii. It provides directly 11 per cent of the employment, 8 per cent of the taxes, and 40 per cent of the income in the Territory derived from private sources.

Interior of new Oahu bulk sugar plant at pier 19, Honolulu.



R E P O R T

OF THE PRESIDENT

HAWAIIAN SUGAR PLANTERS' ASSOCIATION

TO OUR MEMBERS AND THE COMMUNITY . . .

An all-time production record—the greatest in the 120-year history of the industry—was established in 1955. By the end of December, when the last mill has completed its grind, some 1,140,000 tons of raw sugar will have been produced by Hawaii's 28 plantations.

1955 marks the fourth consecutive year in which Hawaii has surpassed the million-ton mark. Though this is gratifying in many respects, the returns from the record crop of 1955 it is estimated will produce only slightly more revenue for Hawaii than was received from the smaller 1954 crop—approximately \$145,000,000. This is because lower sugar prices prevailed in 1955.

Sugar has long been Hawaii's greatest source of commercial income. Excluding the cost of imported raw materials used in local manufactures—sugar accounts for more than one-half of the value of such products. By the same token, sugar provides Hawaii with more than one-third of all the money available to purchase imported goods, which in 1954 totalled \$349,000,000. Thus every sugar dollar has an effect on the standard of living of Hawaii's people.

C & H AND MARKETING

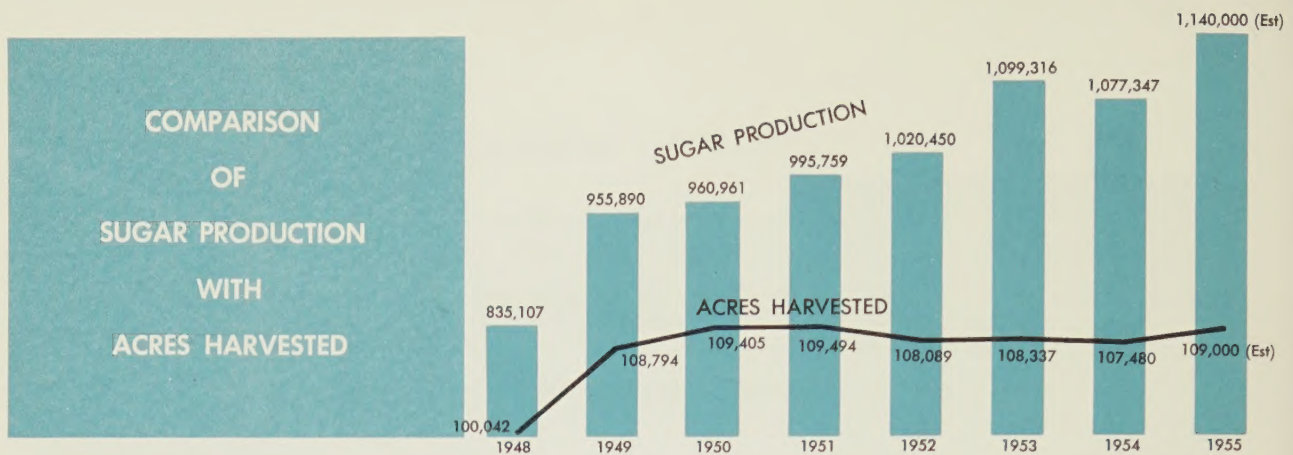
California and Hawaiian Sugar Refining Corporation which markets our industry's total production has experienced another year of intense competition and a depressed market. A strike of some twelve hundred refinery workers added to the difficulties experienced during the year.

To protect our C & H brand against the new and intensified beet competition has been no easy task—particularly in the Western market, which has been our best market for many years past and which must be held as our primary market in the years to come.

Our sales organization continues to do a splendid job in the face of this new threat. The high

caliber of its personnel assures us of the maintenance of the fine reputation our product enjoys with the trade and accounts also for an outstanding performance in sales promotion, advertising, field merchandising, and other important functions.

Our plantations will receive from C & H a net return for 1955 of approximately \$115.59 per ton of 96° sugar as compared with \$118.62 for 1954—a far lower return than is warranted considering the risks involved in the sugar business. It reflects the unstable marketing conditions, the unfavorable sugar prices which prevailed during the year, and the necessity of increasing expenditures to protect our market position.



LEGISLATIVE ACTIVITY IN HAWAII

With these conditions as a background, it is profoundly disturbing to reflect upon the potentially disastrous consequences which could have followed the enactment into law of well meant but ill considered proposals offered in the last Territorial Legislature. Certain legislation was proposed which would have been detrimental to all business and to the Territory. Fortunately for the economic well-being of all Hawaii, many of the proposals died in committee, and others which were pushed through both houses of the legislature were so impractical of implementation without serious effect, that the Governor killed them by veto.

It is vitally important to bear in mind that sugar is our basic crop only because it has been found to be, through the years, the crop best suited to efficient land use and to a higher economic potential. For more than a hundred years, men have been searching for some crop that would be more profitable than sugar. Pineapple has been the only successful contender and it requires no new land at this time. If and when such a new crop, or new industry, is found, sugar production will automatically decline. It should be quite obvious to all, including those who make our laws, that until such time as our lands can be put to more profitable use, we must keep our sugar economy on a sound basis to keep sugar dollars flowing into Hawaii.

To do this effectively, we must at least maintain or if possible increase our present production level.

It is common knowledge that some of our plantations are not in a healthy financial position. Some have not paid a single dividend for many years. These weaker companies cannot be expected to continue indefinitely to incur additional financial burdens such as encountered in recent years, unless there is a reasonable expectation of some real improvement financially.

NATIONAL LEGISLATION

Changes in the Sugar Act favorable to domestic producers were proposed in the last session of Congress but failed of enactment. All elements of the domestic sugar industry supplying the American market are concerned about prompt settlement of the matter when Congress reconvenes next January. Hawaii will not receive any immediate benefit from the proposed legislation; we will share, however, in what has been called the "growth formula" which provides for the domestic industry to share in increased consumption, which under existing law was allotted in its entirety to foreign producers.

Most recent estimates of consumption indicate that Hawaii will not receive any appreciable increase in our present quota until 1958 (a small increase of some 3,000 tons is forecast for 1957). Commencing with 1958, an annual increase in our allotment of between 15,000 and 20,000 tons has been estimated on the premise that consumption of sugar in the United States will continue to rise at the same rate as in recent years.

HSPA EXPERIMENT STATION

I believe our industry probably spends more money on agricultural research than any similar group in the world. However, I have long thought that the costliest thing about research is not to have it.

Apropos of this I quote from one of the historic statements of the industry that appeared in the March 21, 1882, issue of the "Hawaiian Gazette." The writer defines for us the limitations of the good earth of the Islands—as he saw them. Here in part is what he said:

"From last year's crop of 26,000 acres there were produced 56,000 tons of sugar, or about 2.16 tons to the acre. A great deal of nonsense is written about the productiveness of our soil: true that in some exceptionally favored spots, rich river bottoms, and even then only for the first crop planted, as much as five or six tons to the acre have been obtained; but such places are exceptional and the statistics of the yield of 1882 conclusively prove that the average yield of the cane lands in these Islands is very little better than it is anywhere else.

"The very utmost, then, that we could get from our sugar lands would be about 100,000 tons a year. Practically we can never obtain any such crop for though the lands may be there, the elevation and lack of water are an insuperable barrier to our making use of them."

That probably expressed the thinking of the best informed men of the day and while the natural elements do play their part, without research where would we be?

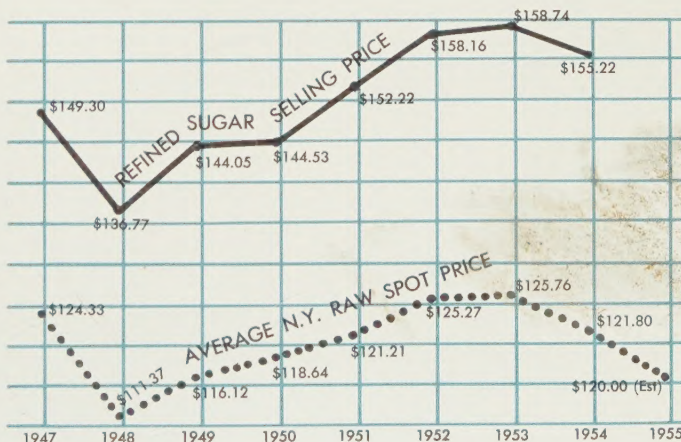
This year our production will be more than 11 times that said in 1882 to be the limit of possibility. Production averaged ^{10.01}~~8.75~~ tons of sugar per acre in 1954 which will be bettered in 1955. Some large-sized field areas for this year produced in excess of 18 tons of sugar to the acre.

It is clear that any dogmatic predictions for the future might be embarrassing, but I do feel safe in saying that with the talent employed in our industry we may with confidence continue to anticipate further progress in our search for new and better ways of doing things.

The work of our station covers a wide range of activities. The station director will make a separate report. Therefore, I shall but mention briefly a few of the more important projects receiving special attention during the year.

1. A study of the effects of the broad scale adoption of aqua ammonia as an important new lower cost source of nitrogen fertilizer.
2. A study of the effect of soil compaction on yields.
3. Water distribution and penetration.
4. Studies of stalk rather than leaf sheath tissue analyses as an aid in cultural practices.
5. Rat poisoning techniques to reduce costs and increase effectiveness.

COMPARISON OF AVERAGE C and H REFINED SUGAR SELLING PRICE WITH N.Y. RAW SPOT PRICE 1947-1955



6. Use of radioisotopes for weighing raw sugar.
7. Soil fumigation to control disease.

And the essential cane breeding program continues with the objective of bringing forth new varieties to challenge those in commercial use or to replace them if they should be endangered by disease. In our production records of today we are reaping the benefits from the fine new varieties developed at our station for exploitation by our plantation managements.

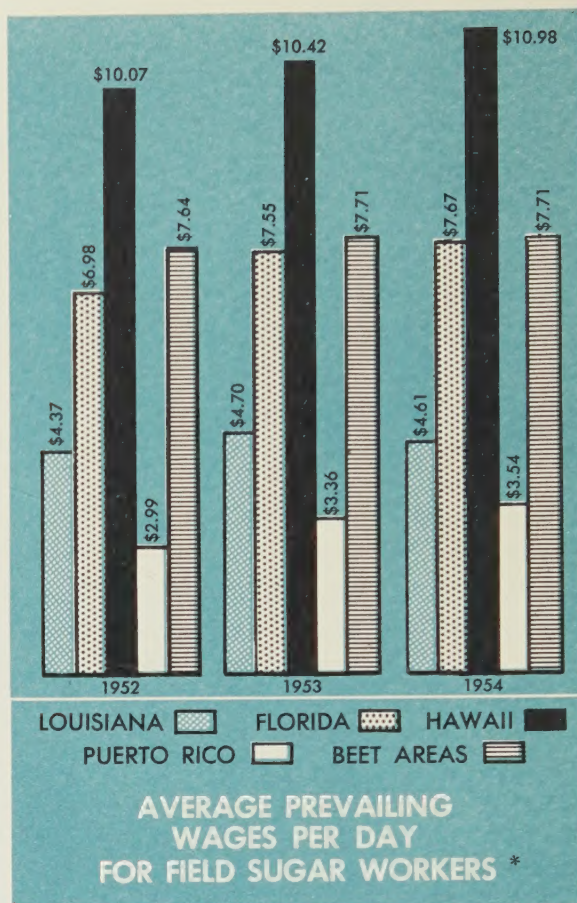
Unrelenting effort is also directed toward the development of machines better adapted to the jobs to be done. Problems which over the years have appeared to be insurmountable are gradually being solved. Our industry stands high in the ranks of those that since the war have gone a long way toward mechanization and the elimination of hard physical labor.

BY-PRODUCTS

Sugar production quotas and price threaten a ceiling on the industry's income from its products. To broaden our income basis we have directed special effort in recent years to the development of By-Products as a new source of income. The urgent need for discovering new and profitable dollars to supplement the industry's revenues from the sale of sugar and molasses has been apparent for some time.

While substantial sums have been spent in the industry's endeavors along this line and many disappointments encountered, at least one project presently under study offers some encouragement.

This is the possibility of utilizing bagasse as a source of pulp in the manufacture of paper. This research has already been commented on a number of times in the past by industry spokesmen. The study has been an involved, tedious and costly one. The staff under whose direction the study has been



* Weighted average, based on 8-hour day in Hawaii and Puerto Rico; 9 hours in other areas. Source: Sugar Reports, No. 41, September 1955, U.S. Department of Agriculture.

made has devoted years to the project. The time for a decision is shortly approaching. It may mean that we are standing on the threshold of a new major development in Hawaii—one in which paper production may become an important part of Hawaii's economy.

Other projects which have been mentioned before but are still being pursued include:

1. The development of a food product for animals and poultry with the ammoniated pith of bagasse and molasses as primary components.
2. The development of bagasse and cement mixtures to produce a lighter and cheaper material to be substituted for other materials now being used for many different purposes.



Students in training at the Experiment Station, HSPA.

Many other subjects are constantly under study by various agencies of the industry, all with the objective of trying to unlock the doors to sugar's treasures.

To this end, a new organic chemistry department at the station will devote its entire efforts

toward the discovery of commercially valuable organic materials which can be produced from cane.

BULK SUGAR

This spring saw the opening of the new \$2,400,000 bulk sugar plant in Honolulu. Operations at this plant marked the completion of a conversion program begun more than 10 years ago to get rid of bags and to handle our sugar by machine in bulk form all the way to the refinery on the mainland. With the completion of the Honolulu installation, each of the four sugar-producing islands has such a plant and next year all sugar produced in the Islands will be handled in bulk.

These plants represent an investment of more than \$7,000,000. The first plant in operation was at Kahului. This was followed by the Hilo plant in 1949, and the Nawiliwili, Kauai, plant in 1950. The final conversion of all sugar to bulk could not be accomplished until Atlantic Coast refiners had equipped their plants to receive sugar in this form.

Typical of the many homes built by sugar employees on new residential sites being opened by plantations.



LABOR-MANAGEMENT RELATIONS AND SUGAR'S FUTURE

Credit for steadily increasing production belongs to no one segment of our industry. Cooperation and teamwork, and the application of progressive scientific knowledge acquired through research over the past fifty years has led to the discovery of higher yielding varieties, a high degree of mechanization, and more efficient methods and practices for the utilization of all the resources of production.

To those who plan the work, to those who carry on our vast program of scientific research, to those who arrange the transportation of our product to market, to those who market it in highly competitive areas, to those whose duty it is to combine all elements into a successful balance, and to those who implement all these things by their labor belongs the composite credit. The accomplishment of the final result depends upon close cooperation between those who direct the work and those who perform the work. Management must make clear

to sugar's employees that it recognizes their importance in the production team, and gives them due credit for work honestly and efficiently performed.

Since 1945 the industry's hourly rated employees have been represented by the International Longshoremen's and Warehousemen's Union. Because labor costs are the major consideration in the success or failure of many of our sugar plantations, the negotiation of new contracts to replace those which expire on January 31, 1956, is of prime importance. In this connection, it has been stated many times that our industry already pays the highest year-round agricultural wages of any sugar producing area in the world and provides steady employment, paid vacations, paid holidays, excellent medical care, a generous pension plan, low rental housing, machinery to lighten physical labor, increased opportunities for home ownership, and recreational facilities for employees and their families.

Labor-management relations in any industry have always been, and will continue to be, a con-



Cane research in air-conditioned green houses.



Pick-up reel on HSPA-designed cane harvesting machine.



Special HSPA-designed cross-flow cutter, mounted on elevating conveyor to cut long pieces of cane into short sections.

troversial subject. And naturally so, for there is room for honest differences of opinion. But we must be vigilant and prudent. We must not submit to unsound expedients that would endanger our economic future. Already over-burdened, our industry cannot afford to jeopardize the jobs of our employees, the investments of our stockholders, and the welfare of the Islands. The presently insoluble economic problems of the industry must be given their full weight among the many other considerations involved in entering into new contractual obligations with the union.

On page four you will see a chart which depicts the average daily earnings of field workers in the

five domestic sugar producing areas for the years 1952 to 1954 inclusive.

Not reflected in these figures is another substantial item of approximately \$3.20 per day for fringe benefits such as pensions, medical assistance, etc., being provided for the sugar worker in Hawaii. This latter cost figure excludes the cost of recreational and other facilities maintained at company's expense.

As in the case of wages the cost for fringe benefits enjoyed by the sugar worker in Hawaii far exceeds the cost of such limited benefits as may be extended to the sugar worker in other parts of the world.

All of this points up to the fact that in no other sugar producing area in the world does the worker fare as well as he does in Hawaii.

All of the people of Hawaii should know this and it should be recognized by the sugar workers.

While there is considerable satisfaction in knowing that our plantations have the ability to produce increasingly large crops, our enthusiasm must be tempered by: (1) a market fixed by law at a level below our production capacity; (2) an unstable price; (3) an extremely unattractive return for the investment of capital; and (4) an uncertain labor cost situation.

Mechanization, unionization, market competition, and regulatory complications—all have combined to make the business of raising sugar a complex and hazardous occupation. All of these important factors, as well as others, must be taken into full account by those of us in management who bear the responsibility for keeping sugar a going concern.

I have said before, that among the important

things we must be concerned with, three, I believe, demand special recognition.

The first of these is Production. The second is Profitability, and the third is Peace.

We must, not only maintain current production efficiency, but improve our techniques to the limit of scientific and technical knowledge. For without continuous and efficient production, there can be no profitability, and if a business cannot make a profit the very reason for its existence is gone and it becomes a burden and a detriment to the economy. And unless we have peace—industrial peace which has as its most important elements understanding and cooperation by all concerned—we cannot reasonably hope to accomplish the first two "musts."

What, then, is the outlook for Hawaii's sugar industry? Do we have a reasonable chance to come through the next few years in sound shape, or must we look forward to a gradual decline, ending in retrenchment or disaster?

My own considered belief is that we do have a

Staff of the Experiment Station, Hawaiian Sugar Planters' Association.





Study of nitrogen losses from aqua ammonia in plastic-lined irrigation ditches.

reasonable chance to move forward instead of backward. I believe that some of the obstacles which seem so insurmountable now, will, in the course of time, be removed or reduced in importance. Improved understanding of our problems by the public, our shareholders, our employees, and the union will do much to help. I am inclined to feel that there has been some improvement in understanding in recent months, and that a good part of it can be attributed to the plain talk and candid appraisal of our problems by the leaders of the industry. I believe union officials recognized these statements for what they were—an honest attempt to let all of the people of Hawaii know what is facing the sugar industry. In subsequent public statements, there has been an indication of a greater willingness on the part of the union to consider the realities of the situation. I think this is a step forward in our relationships, and that in the future it may provide a better base from which to

approach these problems. If an improved understanding can lead to the elimination of areas of friction, then it will have served a very useful purpose. Good intentions and actual performance are, of course, two different things, but there are indications now that both parties to the coming sugar negotiations will make earnest efforts to clear up the problem areas, and to bargain realistically and in good faith. I sincerely hope these indications are accurate reflections of the union's current thinking.

In the light of these developments, it is my opinion we can be hopeful of several specific things. One is that the coming negotiations will be entered into by both sides with the full realization that a peaceful and reasonable settlement is vital to both—and to the Territory as a whole.

Second, I am hopeful that, in the overall approach toward better labor-management relations, some of the secondary leadership of the union will,

with firm and clear policy guidance from the top union leaders, carry out their functions in the future with sober thought and maturity.

Third, I believe it is possible that, if a workable agreement in the coming negotiations is reached, greater union responsibility and cooperation may be hoped for, particularly with respect to utilization of the grievance procedure in contract administration rather than resorting to illegal strikes.

Fourth, I think management is making, and must continue to make, sincere efforts to smooth out rough spots in plantation operations and to develop a deep-rooted sense of teamwork between the company and its employees.

If these desirable things come to pass, we can look forward to coping more effectively with many other problems in the fields of production and business economics.

But permit me to sound a note of caution. We all know that the application of science and research in our sugar industry have brought about many technological advancements with greatly increased yields as a result. A great deal of this

improvement has taken place within comparatively recent years and I think it is only fair to note that we cannot reasonably expect improvement at the same rate to continue indefinitely, and thereby solve all of our problems.

Our share of the American market as set by national legislation fixes a production quota which is now being exceeded. There is no likelihood of any substantial increase being allotted to Hawaii in new legislation now contemplated. Under such conditions an increase in the yield per acre in Hawaii's sugar industry will eventually require the abandonment of some areas now under cultivation.

Yet we must continue to strive to do this very thing—increase yields—if we are to remain competitive.

In a recent speech summing up Britain's grave financial problems Anthony Eden, the British Prime Minister, said: "Every citizen could play his part by producing more at his work and saving more of his earnings. Higher wages, higher profits—these can be justified by higher production.

Display showing the Experiment Station's research on peaceful uses of atomic energy.

HAWAII'S PEACEFUL USES OF ATOMIC ENERGY

Scientists at the Experiment Station of Hawaiian Sugar Planters' Association are currently using radioactive materials which are yielding important results for Hawaii's

SUGAR INDUSTRY

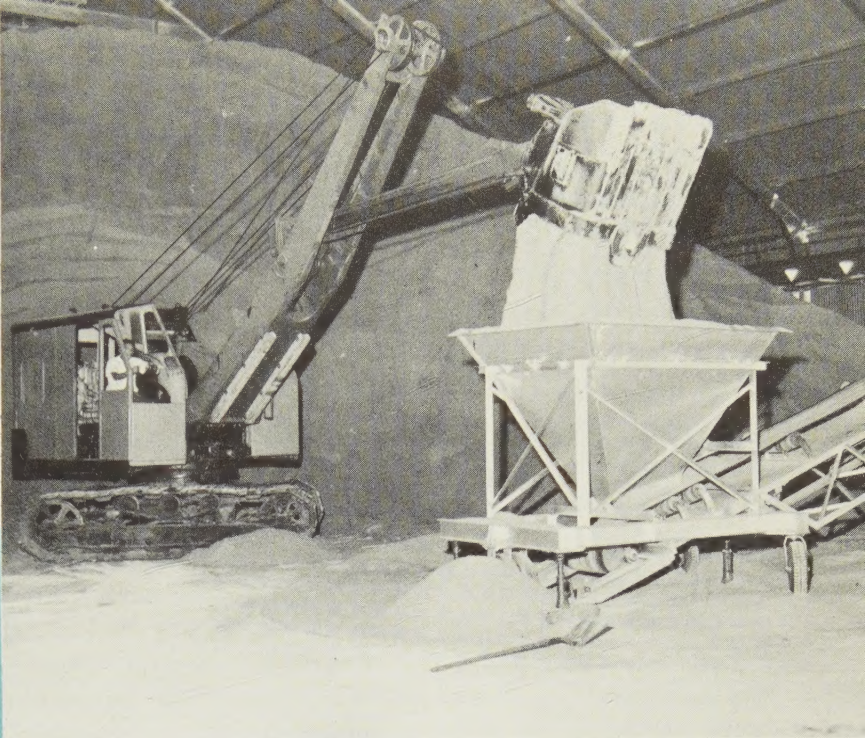
14 RADIOISOTOPES ARE
BEING USED IN THESE
8 SUGAR RESEARCH
PROJECTS IN HAWAII

This is
the
INDUSTRY
that
BENEFITS

HAWAIIAN ISLANDS



Bulk sugar truck at the receiving station of new bulk plant at Aiea refinery of C & H.



Interior of bulk sugar plant at Aiea refinery of C & H.

Neither is justified otherwise. We want to reach a high standard of living. We can do this, but only by higher production. Our greatest danger is to be priced out of the markets of the world because our productivity does not rise as fast as our costs."

While in Hawaii we presently do enjoy a high and still rising standard of living, our sugar industry is likewise faced with the problem and the danger of being priced out of our markets so that we must also strive continually to increase productivity and reduce our costs.

If, as seems likely, there can be little hope that either our quota will be raised appreciably, or that the present price of sugar will advance and hold at a higher level, then we will be squeezed between high production costs, and a static selling price which leaves little in the area between.

Of necessity, this means we must look everywhere to find even the smallest ways to cut costs. We must carefully examine our present practices to find where we are being inefficient. We must be waste-conscious, cost-conscious, and production-conscious. We must come to regard every non-productive use of material and energy as sheer waste which endangers our own security. We must

continually search for better methods, and easier, quicker ways of doing things.

We must remember that we are in a highly competitive business, and need to resort to all the skills and know-how we have against the price-cost pressures that keep closing in.

If we apply ourselves diligently to those tasks, then we are entitled to earn the understanding and cooperation of all those interested in the future of the sugar industry.

Industrial peace is essential and we must have honest and realistic observance of contract obligations by both parties. We must be able to assume that the terms and conditions of a contract will be followed faithfully during the time it is in effect. If this is done, then the agreement becomes an instrument of peace, rather than a source of contention.

With industrial peace, our chances for achieving reasonable profitability are much better. To remain in business, we must turn out a product that will sell for enough to cover all expenses which include such items as wages, salaries, materials, machinery costs, maintenance, depreciation, taxes, and interest on borrowed money. We all know that

profit is the most uncertain return in any enterprise because profit is the residual share which is left over after all other costs have been met. If costs cannot be covered, the enterprise is a failure. And if there is not a reasonable profit over and above costs to reward the owners of a business for the capital risked—this too eventually will result in failure, for under such circumstances there will be no incentive to stay in business.

Net returns of the individual sugar companies, or the dividends that the industry's 14,000 stockholders may expect for the use of their money cannot be estimated at this time. However, it is certain that some companies still will be unable to pay any dividends. And it is quite safe to say that the industry return amounting to some 3.87 per cent on net worth last year, will again be totally inadequate, especially when compared with the average net return of 10.3 per cent enjoyed by 3,442 mainland companies representing all major lines of activity. Taken as an industry we compare with the sick industries of the American economy. This situation is far from encouraging in light of the fact that our industry must compete with mainland firms for the same kind of stockholder money to finance operations.

All of these things greatly affect the outlook for sugar in the years ahead. I am not a pessimist by nature, neither am I an incurable optimist. We have no choice, as I see it, but to face the challenge—meet problems as they arise—and try to solve them in the balanced best interests of everyone concerned.

Progress is essential to any business or industry. We must keep on going forward, developing ourselves and our relations with others, learning where we need to learn, and working constantly for understanding and acceptance by all the various publics with whom we come in contact.

And, above all, we must always bear in mind that in all our efforts to build and maintain suc-

cessful companies, and to continue to improve the standard of living, and to bring economic benefits to all the people of the Territory, we cannot afford to cast aside the fundamental American principles upon which this country was built, and enter into expedient arrangements, simply for the sake of profit, which would infringe upon individual rights or freedoms, or upon our ability to manage under our system of free and independent enterprise.

Since World War II ended a decade ago, Hawaii has experienced a drastic evolution. We have successfully rebuilt our industry which for so long was held in a static posture due to lack of sufficient manpower and supplies. We have passed through an era of adjustment, and now we find the pendulum has swung the other way. Our methods of production have shifted from basically hand operations to highly mechanized operations. Wages have skyrocketed, benefits have increased threefold, living standards have greatly improved. The result of all this is that we are sure to be faced, in the coming decade, with the making of vital decisions. We can rightfully expect more and perhaps even greater changes than have occurred in the past. We must hold fast to our determination to build and to grow in moral stature and in economic importance and service to the people of Hawaii. We must recognize, accept and fulfill our responsibility as the guardians of Hawaii's basic industry, the provider of jobs and income to so many thousands of Hawaii's people. I am confident that the men and women in the sugar industry are equal to the task, and I shall continue to have faith in their ability to lead the way to an even more promising future.

Respectfully submitted,


President

HAWAIIAN SUGAR PLANTERS' ASSOCIATION 1954-1955

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A. G. Budge	2nd Vice President
Ernest W. Greene	Vice President
Slator M. Miller	Asst. Vice President
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T. M. Brown	Treasurer
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G. W. Sumner
A. G. Budge
J. E. Russell
R. G. Bell

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C^{and}H
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sugar

